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April 4, 2014

Daniel J. Mullen, Esquire
Ransmeier & Spellman, PC
P.O. Box 600
Concord, NH 03302-0600

RE: Presby Environmental, Inc. v. Advanced Drainage Systems, Inc.
U.S. District Court Case No. 1:13-cv-00355-SM

Dear Dan:

I enclose herewith Plaintiff's Expert Disclosure in connection with the above-captioned matter.

Thank you and please contact me should you have any questions.

Very truly yours,

CLEVELAND, WATERS AND BASS, P.A.

By: _____


David W. Rayment

DWR/smm
Enclosure
cc: Presby Environmental, Inc.

UNITED STATES DISTRICT COURT
DISTRICT OF NEW HAMPSHIRE

Presby Environmental, Inc.
143 Airport Road
Whitefield, New Hampshire 03598

Plaintiff,

v.

CASE NO. 1:13-cv-00355-SM

Advanced Drainage Systems, Inc.
4640 Trueman Boulevard
Hilliard, Ohio 43026

Defendant.

PLAINTIFF'S EXPERT DISCLOSURE

NOW COMES Presby Environmental, Inc., (the "plaintiff", "Presby", or "PEI"), by and through its attorneys, Cleveland, Waters & Bass, P.A., and submits the within Expert Disclosure pursuant to FRCP 26(a)(2), and states as follows in support thereof:

Rule 26(a)(2):

- Keith Dolan, Strategic Marketing Communications Planner, York, ME, 207-351-6027, keithjdolan@gmail.com. (Retained expert). As set forth in more detail in his report, Mr. Dolan will use his expertise in marketing to assign a monetary damages figure to the lost revenue associated with ADS' breaches of the settlement agreement in the form of representations made to regulatory authorities and stakeholders in the septic industry. These figures are currently limited to the states of which Presby is aware, and if and when further discovery and

investigation reveals additional violations of the Settlement Agreement, the plaintiffs reserve the right to amend Mr. Dolan's report.

- David Presby, c/o Presby Environmental, Inc., 143 Airport Rd, Whitefield, NH 03598, 603-837-3826. (Principal of party, not a retained expert. May be called upon to offer opinions, as the inventor of Enviro-Septic, about the functionality of Enviro-Septic and GEO-Flow and the nature of testing performed or not performed, and injuries suffered by his company stemming from the breaches of the Settlement Agreement and the claims and defenses asserted in this case).
- Lee Rashkin, c/o Presby Environmental, Inc., 143 Airport Rd, Whitefield, NH 03598, 603-837-3826. (Employee of party, not a retained expert. May be called upon to offer opinions about marketing, marketing costs, Presby's experiences, public relations and other opinions associated with the breaches of the Settlement Agreement and the claims and defenses asserted in this case, and injuries suffered by Presby Environmental, Inc.).
- James McMahon, c/o Presby Environmental, Inc., 143 Airport Rd, Whitefield, NH 03598, 603-837-3826. (Employee-principal of party, not a retained expert. May be called upon to offer opinions and/or calculations associated with the breaches of the Settlement Agreement and the claims and defenses asserted in this case, and injuries suffered by Presby Environmental, Inc.).

Rule 26(a)(2)(i-iii): Mr. Dolan's report is attached hereto as Attachment 1.

Rule 26(a)(2)(iv): Mr. Dolan's qualifications are attached hereto as Attachment 2, and he has not authored any publications in the last 10 years.

Rule 26(a)(2)(v): Mr. Dolan has not testified as an expert in court or at deposition within the last four years.

Rule 26(a)(2)(vi): Mr. Dolan is compensated at the rate of \$160 per hour for study and testimony in this case.

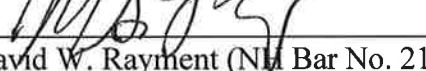
Reservation of Rights

The plaintiff reserves the right to supplement this disclosure upon receipt of discovery responses from the defendant, as well as the right to disclose and call rebuttal expert witnesses.

Respectfully submitted,

PRESBY ENVIRONMENTAL, INC.,

DATED: April 4, 2014

By: 
David W. Rayment (NH Bar No. 2110)
Mark S. Derby (NH Bar No. 13856)
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CERTIFICATE OF SERVICE

I hereby certify that I mailed or otherwise transmitted the within document to Daniel Mullen, Counsel for the defendant, this 4th day of April, 2014.


Mark S. Derby (NH Bar No. 13856)

ATTACHMENT 1

DOLAN MARKETING

Loss Analysis Due to Misperception and/or Confusion

April 4, 2014

This analysis is intended to create clarity and greater understanding as to the scope of Presby Environmental Inc.'s (PEI) losses due to Advance Drainage Systems' (ADS) misrepresentation of their Geo Flow product line to current customers, future prospects (distributors and dealers), state and county officials and industry stakeholders. This misrepresentation is the claim: the ADS Geo Flow product line is functionally equivalent to the PEI Enviro-Septic product line.

Important to note: in 2009, as part of a legal settlement with PEI, ADS agreed to stop representing Geo-Flow's performance as a *functional equivalent*.

Put plainly, the objective of this analysis is to answer the question: when speaking to prospective customers and government officials, what are the results when a company uses the sales pitches of,

"Our product works as well as our competitors' established product" and, "Our product costs less than the established product."

The Process to Determine the Result of Misrepresentation

I have worked as a Strategic Marketing Planner for over 13 years. My experience includes both small and large companies from many different business categories, including construction materials and installation. As part of my work, I research, analyze and make recommendations for companies looking to market and sell their products or services to defined areas, groups or industries etc. The steps taken to build this report have many similar steps to the Strategic Marketing planning process such as: determining market size, discovering customer purchasing habits, how competing manufacturers "position" their products, understanding who or what influences the marketplace, etc. Typically, there is no single method used, but a combination of different research and data gathering steps. These steps and subsequent analysis of the information resulted in helpful conclusions. Below are the steps I took for the process.

Base Knowledge of the Situation

To begin, I reviewed copies of documents from the case including; Notice of Appeal, Initial Disclosures, and PEI's answers to an Interrogatory.

As is typical, I interviewed key managers at PEI. This created a base of understanding for how their business works. I was told their products are sold to distributors, who then sell to contractor/installers. They explained the government's role (state and/or county) and the process for mandatory approvals of materials used in septic systems. All septic systems designs must pass the permitting process before installations can begin.

They told me how PEI has been able to capture as much as 90% of the New Hampshire market for septic system installations over the past 10 to 12 years. The reason for this high market share is the result of

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founder's, David Presby's passion for the industry and his years of assisting the septic system designers and installers with materials and support.

PEI made technological advancements that allow septic systems to require less separation from the water table and less overall area. The systems are also more effective and safe than conventional septic systems. These innovations spurred the growth of PEI by allowing homes to have septic systems much closer to lakes, rivers, etc. with less invasive installations. Septic systems with PEI materials were a much better overall value and the marketplace response was very positive.

I requested detailed records of PEI's sales activities. These sales records are a "map" or history of when and how PEI's business grew. They provided me with sales data from 2003 to 2013 including sales by individual customer and by state.

Methods to Determine Loss

Important to note:

A relevant understanding came from my initial research with PEI. The source of PEI's loss has multiple probable results, including:

- 1) a loss in revenue can occur when PEI loses a current customer.
- 2) a loss in revenue can come from a customer PEI would have gotten if ADS had not represented that Geo-Flow "works the same and costs less."
- 3) due to ADS' misrepresentation of Geo-Flow's performance to the government officials who approve the materials allowed to be used in all the different septic system designs, such as the closer-to-water septic system design innovated by PEI, ADS will have an open market (state and/or county) in which they would not otherwise be able to sell Geo-Flow absent a regulatory approval.

Market Share Approach

As I would attempt when analyzing any business, I wanted to try to establish the company's Market Share. Basic Market Share is a comparison of total sales (by percentage) of competing companies in a defined area of business. Example: if all Birthday Candle makers sell \$10million worth of Birthday Candles in a year, and our candle making company sold \$4million worth of Birthday Candles in the same year, then our company has a 40% Market Share of the total Birthday Candle business.

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Market Share Approach cont.

Determining Market Share is valuable to understand gains and losses in sales revenue over time compared to ones competitors. It can be difficult to determine Market Share in business categories containing mostly (if not all) privately owned companies. Privately owned companies are not required to report their sales and earnings and many times are reluctant to do so. In some categories there are ways of automatically measuring sales volume at the time of purchase, such as consumer products via barcode usage. Unfortunately, there's no direct sales measurement method being used in the septic system materials manufacturing industry.

I continued on, looking for other industry data that can help interpret Market Share and other helpful statistics. I started with industry trade associations and other allied associations. Often, industry trade associations will have conducted industry research and published reports to help create some shared understandings among its members and beyond. These organizations may also publish articles and case studies etc. which include helpful data and statistics. Additionally, I research trade publications and any research created or sponsored by them.

A partial list of associations and trade publications used for research include:

- The National Onsite Wastewater Recycling Association
- Water Environment Research Foundation
- Environmental Protection Agency
- Septicsearch.com,
- NH Office of Environmental Affairs
- Granite State (Septic System) Designers and Installers
- Mass. Office of Energy and Environmental Affairs
- Maine Division of Environmental Health
- New England Interstate Water Pollution Control Commission
- The Water Alliance
- Coalition for Alternative Wastewater Treatment
- Onsite Installer Magazine
- Pumper Magazine
- Journal of Decentralized Onsite Wastewater Treatment Solutions
- Liquid Waste Magazine

The information and data I found helped me gain a greater understanding of how the onsite wastewater recycling marketplace works. I found no relevant national or regional sales data compiled and published. This is not surprising. When a product is sold by generally smaller, entrepreneurial, owner/operator businesses, it has been my direct experience that these types of business segments will gather only very small amounts of conclusive sales data from across the country.

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Market Share Approach cont.

My efforts with the associations and publications yielded one helpful document. It was available from multiple websites, *Update of the Advanced On-Site Wastewater Treatment and Management Market Study: State Reports Summary (2009)*, written by Valerie Nelson, Amy Macrellis, Bruce Douglas. The authors spent a lot of time trying to pull data from all the states. I found a chart listing each state's total number of septic systems in use, estimated number of permits issued per year both new and replacement, and permitting trends. The data showed the big differences in the data between the states. Some were very concise, others had wide ranging estimates, and many results were "not available".

Because this was the closest I'd come to finding large scale market data, I called one of the study's authors, Valerie Nelson. This proved very helpful. We discussed her process and marketplace. She agreed with my experience, during her research she never came across the state-by-state market size, sales revenue data for septic system materials manufacturers I was searching for.

With lack of needed data I turned away from this type of Market Share approach and look toward Customer Behavior to determine PEI losses.

Customer Behavior Approach

In the modern marketplace (both business to business and consumer) the customer has never been more empowered and powerful. In the old marketplace model, manufacturers had the greatest control. In today's business world, the control rests with whoever is "closest" to purchasing decision maker. For example, major retailers like Walmart, have the greatest control because they are the ones that interact with customers directly. In most cases, product manufacturers have to "play by the rules" Walmart sets. Over time, this has caused American customers to feel and act like skilled and empowered purchasing decision makers. They are the driving force. Understanding how customers act, their habits and desires etc. is a highly effective way to plan and forecast future business activities and results.

Two Relevant and Meaningful Customer Behaviors - Pricing

For PEI and other manufactures of septic system materials, their direct customers are distributors and dealers. Their distributors buy and resell PEI products used to make onsite septic systems. These distributors sell to septic system contractors who then install PEI septic systems for there customers. Their dealers are septic system installation contractors and/or septic system designers who also install septic systems. All of PEI's customers are part of the greater building and construction services segment.

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Two Helpful Customer Behaviors cont.

I began research into building contractor customer behavior including purchasing behavior. I found statistics from surveys ranking what's important to contractors when purchasing building materials.

In the research study entitled The Considered Purchase Decision -What Matters, What Doesn't and What It Means For B2B Marketing and Sales, (Research report compiled by *TriComB2B* in partnership with the University of Dayton School of Business Administration). It stated,

“About two-thirds of survey respondents indicated that 60% or more of their purchase decisions were dominated by the immediate purchase price. On average, price dominated in 64% of the purchases (Table 3). There was no significant difference in response by decision role, industry type, age group or role in the firm.”

Additionally, from their Contractor Behavior Survey of 500 contractors nationwide compiled by LEK Consulting N.A. for their article, US Building for the Future: Contractors Reveal New Opportunities for Product Manufacturers.

What's most important? - Contractor Responses to Price Pressure

#1 response overall – *Purchasing same brands at less expensive retailers and distributors* (53%)

#2 pricing question response – *Purchasing less expensive brands* (22%)

“Contractors are more often switching channels for better pricing while maintaining their same brand” concludes author Chris Kinney.

Actively searching out lower pricing for the same product/brand was the most important aspect of sourcing materials for building contractors the US. This leads to the second relevant and meaningful purchasing behavior.

Two Relevant and Meaningful Customer Behaviors – “Copycat” Products

The “copycat” or “me too” strategy for bringing new products to the marketplace has been used successfully for years. There are the protectable types of scenarios such as iPhone's copycat Samsung's Galaxy phones and the less protectable, such as Pepsi as a copycat of Coca Cola. There are two basic types of copycat products: 1) the copycat product attempts to function or perform as good as the original and; 2) the copycat attempts to mimic the appearance of the original thus the function and perform sameness is implied.

Apple has sued Samsung because the functionality of the iPhone is patent protected. Coke has taken legal action against Pepsi claiming Pepsi's package design was too similar to Coke's trademark protected packaging. Typically a claim similar to Coke's claim is more opinion based and thus more difficult to prove.

Two Relevant and Meaningful Customer Behaviors – “Copycat” Products cont.

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Can copycat products be successful? Brian Wong in his article Why Copycats Are The Best Thing To Happen To Your Company says, "...copycat businesses should be welcomed. Embraced, even. After all, what is a copycat business other than evidence that you've created a solution that taps into and services a real need?" Companies are drawn into copycat product development for two main reason, a very strong leading product exist making it much easier to position a "me too" product against the leader or they perceive the leading product being "spread to thin" and try to take advantage perceived vulnerability.

From the Harvard Business Review website article by Ndubuisi Ekekwe, When you can't Innovate, Copy "Nothing breeds copycats like a successful business venture. When a new business idea is incubated and executed successfully, cloners naturally emerge and imitate. ...So, from business books to business schools and corporate boards, everyone is talking about innovation. But, copying others is a reality of doing business."

The copycat business model is well established. This website is dedicated to it *copycat-innovation.com*

Andrew Patrick states in his article for Pacific Innovation and Leadership, Copy Cat Your Way to Success – Part 2 – Market Validation

"Being a fast follower means knowing how to imitate products and services already "out there" that are starting to win; in other words, they are proven or near proven. With that proof, our innovation risk falls even further."

Conclusions of Customer Behavior and Relevance to Misrepresentation and Confusion

The copycat or "me too" product has been a successful strategy for a long time. Companies have created successful businesses copying and selling existing products for a long time as well.

PEI's products are not sold directly to end user customers. There is no fancy or specially-designed packaging. The products are covered up after installation. Because of this, the main copycat strategy available is the claim that "our product works as good as our competitors' established product." This is a claim of *functional equivalency* with PEI's approved Enviro-Septic products.

Low price is the driving force behind many, if not most purchasing decisions in the US, and building industry contractors are no different. When the contractor is given the option to buy equal performing building materials, they will be most likely purchase the lower priced material.

It is my opinion in this situation Customer Behavior is straightforward. Any company selling septic system materials that claim *functional equivalency* and actively selling to septic system distributors and dealer/contractors at a lower price than Enviro-Septic products has a high probability to capture a significant amount of both market share (sales revenue) and market share (customers; distributors and dealers).

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Revenue Loss Assumptions and ConclusionsDistributor/Dealer Revenue Loss

1. Distribution/Sales is strongest in NH: in 2013, 26 Dist./Dealers accounted for 60.9% of US revenue

2. 2013 Revenue by State, Dist./Dealer mix and Average Revenue by Dist./Dealer per State:

<u>State</u>	<u>2013 Revenue per State</u>	<u>Number of Dist./Dealers</u>	<u>Ave. Revenue per Dist./Dealer</u>
AL	\$95,526	3	\$19,105
AZ	\$5,291	1	\$5,291
GA	\$1,935	1	\$1,935
IN	\$555,953	5	\$92,658
MO	\$25,585	2	\$12,792
MA	\$351,690	7	\$43,961
ME	\$433,079	12	\$17,323
MT	\$118,210	3	\$29,552
ND	\$9,813	2	\$4,906
NH	\$3,035,937	25	\$116,766
NY	\$63,349	7	\$9,049
OH	\$47,107	3	\$11,776
VA	\$28,959	2	\$14,479
VT	\$155,643	6	\$22,234
WY	\$49,786	3	\$12,446
	\$4,977,863	82	

3. Brand awareness is strongest where market share is the highest (in New Hampshire PEI has approx. 90% market share).

4. Current average lifetime of the Dist./Dealer relationship (LCR) is 5.21 years (based on 2013 active Dist./Dealers)

5. Current Dist./Dealer Revenue Categories:

A Level =	Over \$500,000
B Level =	\$250,000 to \$500,000
C Level =	100,000 to 250,000
D Level =	\$50,000 to \$100,000
E Level =	\$20,000 to \$50,000
F Level =	\$5,000 to \$20,000
G Level =	\$0 to \$5,000

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Revenue Loss Assumptions and Conclusions cont.

6. Current Dist./Dealer Mix of Revenue categories based on 2013 revenue:

A Level =	2	Over \$500,000
B Level =	3	\$250,000 to \$500,000
C Level =	7	\$100,000 to 250,000
D Level =	11	\$50,000 to \$100,000
E Level =	19	\$20,000 to \$50,000
F Level =	18	\$5,000 to \$20,000
G Level =	22	\$0 to \$5,000

7. In my opinion, ADS with an unrestrained competitive advantage of product *functional equivalency* and lower pricing, the PEI loss of Dist./Dealer relationships and/or shrinking revenue with current Dist./Dealer base and/or decreased number of new Dist./Dealer relationships, over time, has the realistic potential of reducing current market share and revenue. Additionally, it could be limiting future market and revenue growth up to 40% to 60% or possibly higher if PEI is unable to defend their competitive advantage of product differentiation and perceived value to current and future customers and prospects.

8. Loss Analysis for 2009 to 2013 Dist./Dealers:

Important: when projecting future loss/gain based on marketplace activity it is prudent and ultimately more valuable to be conservative when estimating corporate performance.

2009-2013 Conservative Projection - 15% Loss of Dist./Dealer Base by Revenue Category (2009 Dealer Level)

<u>Dist/Dealer</u> <u>Revenue</u> <u>Category</u> <u>Level</u>	<u>Bottom of</u> <u>Range Value</u> <u>for</u> <u>Calculation</u>	<u>2009 Total</u> <u>Number of</u> <u>Dist/Dealers</u>	<u>Conservative</u> <u>Estimate of</u> <u>Dist/Dealers</u> <u>Loss (15%)</u>	<u>Conservative</u> <u>Estimate of</u> <u>Revenue</u> <u>Loss per</u> <u>Year (15%)</u>	<u>Current</u> <u>Average</u> <u>Lifetime of</u> <u>Dist/Dealer</u> <u>Relationship</u> <u>(Years)</u>	<u>Total for</u> <u>Estimate of</u> <u>Loss to</u> <u>Dist/Dealers</u>
A	500,000	0	0.00	\$0	5	\$0
B	250,000	4	0.60	\$150,000	5	\$750,000
C	100,000	9	1.35	\$135,000	5	\$675,000
D	50,000	6	0.90	\$45,000	5	\$225,000
E	20,000	20	3.00	\$60,000	5	\$300,000
F	5,000	25	3.75	\$18,750	5	\$93,750
G	1,000	30	<u>4.50</u>	4,500	<u>5</u>	<u>\$22,500</u>
						\$2,066,250

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Revenue Loss Assumptions and Conclusions cont.

9. Loss Analysis, for Non-Acquisition of Future Dist./Dealers: Revenue profiles for newly acquired Dist./Dealers

<u>New Acquisition Dist./Dealer Revenue Category Level</u>	<u>Four Year Average Lifetime Customer Relationship Revenue Values for Calculation</u>					
<u>Dealer Size</u>	<u>Year One</u>	<u>Year Two</u>	<u>Year Three</u>	<u>Year Four</u>	<u>Year Five</u>	<u>Total</u>
Large	\$25,000	\$35,000	\$47,500	\$65,000	\$90,000	\$262,500
Medium	\$12,000	\$18,000	\$28,000	\$40,000	\$58,000	\$156,000
Small	\$5,000	\$8,000	\$17,000	\$25,000	\$37,000	\$92,000

Note: in 2013, there were 13 new customer acquisitions; included were 7 Dist./Dealers above \$25,000 of year one revenue.

10. Loss Analysis Future Dist./Dealers 2014-2018: Scope of Loss to Cover Length of Product Patent 2026 (1 of 3)

Conservative Projection - 20% Loss of Past and Future New Acquisitions of Dist./Dealers for the LCR (5 years)

<u>New Acquisition Dist./Dealer Revenue Category Level</u>	<u>Average Lifetime of Customer Relationship (5 years) Conservative Revenue Value</u>	<u>2012-13 Number of New Acquisition Dist./Dealers</u>	<u>Estimate of Number of Past/Future Dist./Dealers Not Acquired (20%)</u>	<u>For Each Year Not Aquiring New Dist. Dealers 2014-18 (4 years)</u>	<u>Total Revenue Loss for Non-acquisition of New Dist./Dealers</u>
Large	\$262,500	9	1.8	4	\$1,890,000
Medium	\$156,000	9	1.8	4	\$1,123,200
Small	\$92,000	<u>6</u>	1.2	4	<u>\$441,600</u>
		24			\$3,454,800

11. Loss Analysis Future Dist./Dealers 2019-2023: Scope of Loss to Cover Length of Product Patent 2026 (2 of 3)

Conservative Projection – 27.5% Loss of Past and Future New Acquisitions of Dist./Dealers for the LCR (5 years)

<u>New Acquisition Dist./Dealer Revenue Category Level</u>	<u>Average Lifetime of Customer Relationship (5 years) Conservative Revenue Value</u>	<u>2012-13 Number of New Acquisition Dist./Dealers</u>	<u>Estimate of Number of Past/Future Dist./Dealers Not Acquired (27.5%)</u>	<u>For Each Year Not Aquiring New Dist. Dealers 2014-18 (4 years)</u>	<u>Total Revenue Loss for Non-acquisition of New Dist./Dealers</u>
Large	\$262,500	9	2.475	4	\$2,598,750
Medium	\$156,000	9	2.475	4	\$1,544,400
Small	\$92,000	<u>6</u>	1.65	4	<u>\$607,200</u>
		24			\$4,750,350

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Revenue Loss Assumptions and Conclusions cont.

12. Loss Analysis Future Dist./Dealers 2023-2026: Scope of Loss to Cover Length of Product Patent 2026 (3 of 3)

Conservative Projection – 37.5% Loss of Past and Future New Acquisitions of Dist./Dealers for the LCR (5 years)

<u>New Acquisition Dist./Dealer Revenue Category Level</u>	<u>Average Lifetime of Customer Relationship (5 years) Conservative Revenue Value</u>	<u>2012-13 Number of New Acquisition Dist./Dealers</u>	<u>Estimate of Number of Past/Future Dist./Dealers Not Acquired (37.5%)</u>	<u>For Each Year Not Acquiring New Dist. Dealers 2014-18 (4 years)</u>	<u>Total Revenue Loss for Non-acquisition of New Dist./Dealers</u>
Large	\$262,500	9	3.375	4	\$3,543,750
Medium	\$156,000	9	3.375	4	\$2,106,000
Small	\$92,000	<u>6</u>	2.25	4	<u>\$828,000</u>
		24			\$6,477,750

Communications Expense

Actions for Attempting to Reduce the Negative Effects of Misperception and Confusion

For PEI to work toward minimizing the negative effects of marketplace misperception and confusion, they will have to initiate aggressive and sustained strategic communications. By doing so they may be able to:

- slow down competitor claims to customer, prospects, stakeholders and influencers
- communicate key differentiation points concerning, specific products, their brand, company culture and personnel
- raise top-of-mind name awareness to prospects, current customer, government officials, etc.
- begin creating industry contact with influencers- the press (including blogosphere), academia, key clients
- engage in social media

The two key elements of possibly minimizing the negative effects of misperception/confusion are message integration among all communications tools and use a high frequency of messaging to begin and “pulse” the of messaging for efficiency while measuring effectiveness.

Integrated Communications Tactics and Tools to Consider

- Messages development – prioritize and reduce communications is key to realizing the benefits of an integration strategy.
- Internal communications – Ongoing education of staff and allied partners marketplace feedback, changes and opportunities.
- Internet – Social media campaign to deliver core messaging, direct opinion, keep current with the marketplace
- Events – trade events, meetings/seminars to proactively communicate and measure response. Seek out and connect with new influencers.
- Events – Small, personal, high value event), for connecting with the most connected or “listened to” influencers.
- Public Relations – Feature story, new product innovation, human interest, benevolent act, etc.
- Internet – website update to integrate messaging.

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Revenue Loss Assumptions and Conclusions cont.

**Communication Tools Cost
Estimate**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	Total
Mes. Dev.	4,500	2,000	2,000	4,500	4,500	2,000	2,000	4,500	2,000	2,000	4,500	2,000	2,000	\$38,500
Int. Comm.	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	\$52,000
Social Med	9,600	9,600	9,600	9,600	9,600	9,600	9,600	9,600	9,600	9,600	9,600	9,600	9,600	\$124,800
Event 1	15,000	15,000	15,000	15,000	15,000	15,000	15,000	18,000	18,000	18,000	18,000	18,000	18,000	\$213,000
Event 2	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	\$78,000
PR	4,800	4,800	4,800	4,800	4,800	4,800	4,800	6,000	6,000	6,000	6,000	6,000	6,000	\$69,600
Website	5,000	3,000	5,000	3,000	3,000	5,000	3,000	5,000	3,000	5,000	3,000	5,000	3,000	\$51,000
														\$626,900

This report is written by Keith Dolan. It represents my research, analysis and professional opinions.



Keith J. Dolan/April 4, 2014

ATTACHMENT 2



Strategic Marketing Communications Planner

Strategic marketing communication planner engaged in the successful development and management of marketing communications initiatives based on clear objectives and stake holder follow through.

Skills and Strengths:

- Strategic marketing/brand planning & research
- Consensus building from assistant to C-level
- Leading team-oriented ideation and work sessions
- Defining goals and stimulating "buy in"
- Maximizing vendor relationships
- Building ROI-based tactical marketing initiatives
- Creating B-to-B lead generation programs
- Mentoring and team building
- Complex mar com project management
- Creative conceiving and problem solving
- Conflict resolution
- Executive producing (managing agency/clients)
- Entrepreneurial business (P&L) management
- Mar com budget management

Experience:

Marketing Communication Planner/Principal
Dolan Strategic Marketing, York, ME

April '06 to Present

Responsibilities and accomplishments

- 2012 to current; leading growth/exit strategy and implementation for Shore Companies the leading deep foundation/helical pier installer in the greater NJ/NY area.
- 2008 to 2011 worked exclusively with Marcal Mfg. new CEO and management team to develop and launch the national consumer brand Small Steps - 100% recycled paper products.
- Conceived and developed Marcal's 2010 "Official Sponsors of Fall Foliage" advertising campaign gaining coverage in media including NY Times feature story.
- Created and headed Marcal's Environmental Advocacy initiative, working directly with NGOs and other key influencers to raise awareness/brand perception and drive product trial.
- Managed development, production and distribution of Marcal's first national television commercial.
- Co-managed Small Steps Earthday "Urban Forest" event in Time Square, NYC. Gained national media coverage including ABC's Good Morning America.
- Additional clients include, Vassan/Finland, Princeton Equity Group, Harbour Light Strategic Marketing

Strategic Marketing Planner and Director of Account Services
Harbour Light Strategic Marketing, Inc., Portsmouth, N.H.

July '03 to January '06

Responsibilities and accomplishments

- Strategic marketing planner for clients including McLane Law Firm (Northern New England's largest), Smuttynose Brewing Co., American Traditional Products, Seacoast Media Group (Division of Dow Jones), Lamprey Surefire, Craft House Int., Cheney Cos./Domistyle Brand and Charter Oak Financial Services.
- Lead creative and account management teams through the complete strategy, tactics, creative development, implementation and measurement process.
- Developed, launched and managed first ever metro Boston focused, BtoB marketing initiative for McLane Law Firm resulting in new client acquisitions in Massachusetts.
- Panelist at NH Business Magazine's conference on *Innovations for Growing Business*.



Strategic Marketing Planner/Principal
Driving ROI Strategic Marketing, Portsmouth, N.H.

April '99 to June '03

Responsibilities and accomplishments

- Strategic marketing planning for clients including Timberland, Vlasic Foods, High Liner Foods, Riverside Sports Mfg., Great Canadian Paddle Sports, NEAV Inc.
- Managed complete strategic marketing process from research and planning through tactics, creative development, implementation and measurement including all vendor relationships and budgeting.
- Created internal communication strategy and tactics for the new *Invention Factory* division of Timberland resulting in winning "hearts and minds" of Timberland employees company-wide.
- Developed and managed first ever marketing coop partnership with Sharp Electronics North America.
- Special liaison for Vlasic Foods President, Timothy Spring to assist with national agency-of-record account review.

Director of Account Management and Business Development
The Cyr Group, Marketing and Advertising, Portsmouth, N.H.

December '96 to June '99

Responsibilities and accomplishments

- Client management and account planning for clients including Willis Croon Insurance of North America (North America's leading ski resort insurer), Western Red Cedar Lumber Association, Bookland of Maine, Wentworth Douglas Medical.
- Promoted to Director of Account Services/Business Development.
- Mentored by Richard Cyr, expert in Integrated Marketing Communication principles and practices.

Executive Producer

Sean Tracey Associates, Portsmouth, N.H., a national commercial film production company

January '90 to November '96

Responsibilities and accomplishments

- Executive produced commercials for clients including, NBC Nightly News, McDonalds, NBC Sports, Easy-Off, Centrum Silver, Louis Rich Foods, A&E Network.
- Managed commercial production budgets up to \$400K including cost control and profitability.
- Pitched and won new clients including; Certaineed, TJ Maxx, Marshalls, Centrum Silver, Hill Holliday/Boston, Arnold Communications Worldwide, Mintz & Hoke.

Education:

University of New Hampshire, Durham, N.H.
Communications

Derryfield School, Manchester, NH
College Preparatory